UMASS / TOWN OF AMHERST HOUSING & ECONOMIC DEVELOPMENT PLAN

FINAL PRESENTATION

TOWN GOWN STEERING COMMITTEE

AGENDA

Work to Date
Final Recommendations
• Site & Program
• Development Mechanisms
• Innovation Economy
• Organization
Implementation Steps
WORK TO DATE

SUMMARY:

- Amherst’s economic and residential growth is driven by UMass
- Local housing supply is not keeping pace with demand, including student demand
- Both economic opportunity and lack of housing is contributing to the decline in the young workforce
- Development constraints (available land, zoning, approval process) are contributing to the imbalance between UMass and Amherst
SUMMARY: OBSERVATIONS

UMass and Amherst have physically disconnected and disengaged over time.

Lack of forums encouraging collaboration between UMass and Amherst (although the Amherst Business Improvement District is one).
SUMMARY:

Many levels of positive interrelationships between UMass and Amherst

PRELIMINARY RECOMMENDATIONS

Mixed use development with housing for students and retail

Foster local start-up and entrepreneurial community

Shared approach towards future development
COMMUNITY FEEDBACK

Received feedback for Agust 4th TGSC meeting via emails and letters

- Housing:
  - Concern for student impact on nearby neighborhoods
  - Tension between wanting to remove unruly student behavior and connect energy to Downtown
  - Importance of housing affordability

- Economic development
  - Desire for tax revenue
  - Need for a year round population
  - Desire for more dining options
  - Need for entrepreneurial space

STUDENT FEEDBACK

- Little incentive to utilize Downtown
  - Pre-paid, excellent dining options on campus
  - Doesn't have the same appeal as a Northampton or larger Downtown
  - Proximity is an issue
  - Recommended special events as an excellent way to attract more student activity

- Would welcome higher quality housing, but affordability is an issue
  - Belief that off-campus housing is more affordable than on-campus housing
  - Student group homes will always be desirable

- Desire by Greek Life to use a housing cluster as a means of legitimizing their organizations
  - Can create a new social hub for the University, compliant with University regulations, away from neighborhoods
  - May address some of the off-campus party conflicts
FINAL RECOMMENDATIONS

SITE & PROGRAM
WHERE IS THE OVERLAP

Walking Zones
Intersection of Zones

FOCUS AREA

- Within close proximity of campus core and village center / downtown
- On UMass owned land
- Undeveloped / underdeveloped sites
- Appropriate for a mix of housing
MASS AVE
ALTERNATIVE 1

- Mixed Use with graduate and upper-classman housing
- Active first floor with blend of start-up / research space and retail
- Mass Ave. as “Main Street” with dynamic small scale uses guide students coming from campus south along North Pleasant Street

MASS AVE
ALTERNATIVE 2

- Mixed Use with graduate and upper-classman housing
- Active first floor with blend of start-up / research space and retail
- “Main Street” south of Mass Ave. with dynamic small scale uses guide students coming from campus south along North Pleasant Street
- Neighborhood grid complete and made “public” to eliminate dead end streets
UNIVERSITY DRIVE

- Undergraduate "student village" with student housing and some academic / flex research space
- University Drive activated with active ground floor uses including retail

FOCUS AREA

N. PLEASANT ST CORRIDOR
Infill housing at the Gateway site with active uses on North Pleasant for faculty and staff, residents, and students

Mixed use commercial, retail, housing, office space, co-working space on commercial site at Kendrick Park

Consistent with Gateway Plan and Kendrick Place / Carriage Shops development
FOCUS AREA

NORTH AMHERST

Owned by Individuals
Owned by Entities
Parking Lots
UMass Property
Buildings

NORTH AMHERST

PUFTON VILLAGE DR

Ownership

NORTH PLEASANT

BUILDINGS

11/5/14
NORTH AMHERST HOUSING

- Redevelopment of North Village Apartments for graduate / family housing
- Cluster housing replaced by a street
- System with a primary “front door” street anchored on west and east ends by recreational amenities.
- Street grid connected north and south to adjacent development

FOCUS AREA

- Site of student housing project, new affordable housing, and underutilized UMass land and buildings
- Previously envisioned as a fraternity cluster
- Away from Downtown, Village Centers
SITE EVALUATION

• Lessened connectivity to Amherst
• Away from traditional neighborhoods

SITE EVALUATION

• More prominent sites
• Potential bridge to Downtown
SITE EVALUATION -

Delmar Loop, Washington University in St. Louis
SITE EVALUATION -

University of Rochester

SITE EVALUATION -

Arts & Culture
## SITE EVALUATION

<table>
<thead>
<tr>
<th></th>
<th>Mass Ave</th>
<th>University Drive</th>
<th>N. Pleasant</th>
<th>N. Amherst</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ideal Market</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Undergraduate upperclassman • Graduate</td>
<td>• Undergraduate</td>
<td>• Undergraduate upperclassman • Graduate • Faculty &amp; Staff</td>
<td>• Undergraduate upperclassman • Graduate • Faculty &amp; Staff</td>
</tr>
<tr>
<td>Downtown / Village Center Connectivity</td>
<td>Moderate</td>
<td>Low</td>
<td>High</td>
<td>High / Village Center</td>
</tr>
<tr>
<td>Campus Core Connectivity</td>
<td>High</td>
<td>Moderate</td>
<td>Moderate</td>
<td>Low</td>
</tr>
<tr>
<td>Site conducive to development</td>
<td>Large footprints of surface parking</td>
<td>Large footprints but need to understand site suitability</td>
<td>Requires an assemblage / infill strategy but feasible</td>
<td>Requires significant demolition but quite feasible</td>
</tr>
<tr>
<td>Proximity to non-student neighbors</td>
<td>Relatively close</td>
<td>Relatively far</td>
<td>Relatively close</td>
<td>Relatively far</td>
</tr>
</tbody>
</table>

## SITE EVALUATION

## RECOMMENDATIONS

<table>
<thead>
<tr>
<th></th>
<th>Mass Ave</th>
<th>University Drive</th>
<th>N. Pleasant</th>
<th>N. Amherst</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ideal Market</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Undergraduate upperclassman • Graduate</td>
<td>• Undergraduate</td>
<td>• Undergraduate upperclassman • Graduate • Faculty &amp; Staff</td>
<td>• Undergraduate upperclassman • Graduate • Faculty &amp; Staff</td>
</tr>
<tr>
<td>Downtown / Village Center Connectivity</td>
<td>Moderate</td>
<td>Low</td>
<td>High</td>
<td>High / Village Center</td>
</tr>
<tr>
<td>Campus Core Connectivity</td>
<td>High</td>
<td>Moderate</td>
<td>Moderate</td>
<td>Low</td>
</tr>
<tr>
<td>Site conducive to development</td>
<td>Large footprints of surface parking</td>
<td>Large footprints but need to understand site suitability</td>
<td>Requires an assemblage / infill strategy but feasible</td>
<td>Requires significant demolition but quite feasible</td>
</tr>
<tr>
<td>Proximity to non-student neighbors</td>
<td>Relatively close</td>
<td>Relatively far</td>
<td>Relatively close</td>
<td>Relatively far</td>
</tr>
</tbody>
</table>
SITE EVALUATION
RECOMMENDATIONS

While all of the sites were identified due to their feasibility, we recommend MASS AVE & N. PLEASANT STREET as the sites with the most significant potential for impact:

• Can serve as a bridge between campus and downtown
• Housing can be developed to accommodate multiple market types
• Tremendous opportunity to connect to nearby academic and research uses
• Can be developed contiguously in phases
• Identified on UMass Master Plan as a mixed-use opportunity
• Builds on recent private and public investment

FINAL RECOMMENDATIONS
DEVELOPMENT MECHANISMS
DEFINING THE PUBLIC PRIVATE PARTNERSHIP (P3)

RANGE OF PRODUCTS

- Appears part of campus
- Predominantly single use
- University managed
- Cost controlled

- Activates campus edge
- Mixed-use
- 3rd party managed
- Market rate

DEFINING THE PUBLIC PRIVATE PARTNERSHIP (P3)

ADDRESSING RISK

For both the University and Developer, P3’s have inherent risk. This can be mitigated, but specific risks need to be identified early on.

<table>
<thead>
<tr>
<th>University Risk</th>
<th>Potential Intervention</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit Impact</td>
<td>- 3rd party managed&lt;br&gt;- No participation in financing&lt;br&gt;- No participation in leasing&lt;br&gt;- Land unsubordinated to project</td>
</tr>
<tr>
<td>Control</td>
<td>- Institute project covenants and performance metrics&lt;br&gt;- Manage housing</td>
</tr>
</tbody>
</table>
DEFINING THE PUBLIC PRIVATE PARTNERSHIP (P3)
ADDRESSING RISK

For both the University and Developer, P3’s have inherent risk. This can be mitigated, but specific risks need to be identified early on.

<table>
<thead>
<tr>
<th>Developer Risk</th>
<th>Potential Intervention</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Cost</td>
<td>• Higher rental rate</td>
</tr>
<tr>
<td></td>
<td>• University funded site or infrastructure investments</td>
</tr>
<tr>
<td></td>
<td>• Discount on land</td>
</tr>
<tr>
<td></td>
<td>• University credit enhancement</td>
</tr>
<tr>
<td></td>
<td>• University equity investment</td>
</tr>
<tr>
<td>Leasing</td>
<td>• Master lease</td>
</tr>
<tr>
<td></td>
<td>• Marketing</td>
</tr>
<tr>
<td></td>
<td>• Agreement regarding adding future supply</td>
</tr>
</tbody>
</table>

DEFINING THE PUBLIC PRIVATE PARTNERSHIP (P3)
CHALLENGES SPECIFIC TO UMASS

P3’s for UMass student housing are untested, and have legal, political, and operational hurdles

• Precedent for litigation related to privately developed student housing for public university students
• Can require a high standard of labor compliance
• Requires Board of Trustees approval
• Needs to address cost, student code of conduct, campus housing standards
• Desire by Town of Amherst to capture property tax revenue
DEFINING THE PUBLIC PRIVATE PARTNERSHIP (P3)

CONCLUSIONS

- P3’s may be a viable option to increase housing supply, but will not be determined until there is a concerted effort to engage political leadership, legal council, and private sector.
- Development structure will be a combination of University priorities, developer return requirements, market assessment, and political approvals and support.
- Site and program will help determine target market, campus / community spectrum, and political support at local and State levels.

APPLICABLE LAND USE TOOLS

<table>
<thead>
<tr>
<th>OPTIONS</th>
<th>INTENDED OUTCOMES</th>
</tr>
</thead>
<tbody>
<tr>
<td>INCLUSIONARY / INCENTIVE ZONE</td>
<td>Affordable housing created on- and off-site</td>
</tr>
<tr>
<td>OVERLAY DISTRICT</td>
<td>Infill and aggregated development</td>
</tr>
<tr>
<td>MIXED USE DISTRICT</td>
<td>Improve options and amenities</td>
</tr>
<tr>
<td>SPECIAL USE DISTRICT</td>
<td>Added units, e.g. accessory apartments</td>
</tr>
<tr>
<td>C.40R AND C.40B</td>
<td>Creation of controlled affordable units</td>
</tr>
<tr>
<td>PERFORMANCE STANDARDS</td>
<td>Mitigation for bonuses</td>
</tr>
<tr>
<td>CODE ENFORCEMENT</td>
<td>Ensure safety and livability</td>
</tr>
<tr>
<td>LICENSE / REGISTRATION</td>
<td>Reliable data</td>
</tr>
<tr>
<td>DEVELOPMENT AGREEMENT</td>
<td>Predictable process and known outcomes</td>
</tr>
</tbody>
</table>
LARGE-SCALE DEVELOPMENT DISTRICTS

TWO-STEP PROCESS:

MASTER PLAN
- Approve Master Plan of Development, and,
- Agree on Design and Performance Standards

SITE PLAN REVIEW
- Based on Master Plan and Application of the Design and Performance Standards,
- Approve Design for Construction

EXAMPLES:
New Town Center, Wayland, MA
Storrs Center, Mansfield, CT
University Station, Westwood, MA
DEVELOPER’S AGREEMENT

Definition: Contract between municipality and an entity that controls property within the municipality for the purposes of real estate development

Applied outside of, or in addition to, local land use regulatory functions

Includes terms, conditions, standards and responsibilities between the parties such as, use mix, design quality, infrastructure improvements, mitigation, performance standards, phasing, town contributions, guarantees, and contingencies

EXAMPLE:
McLean Hospital Redevelopment, Belmont, MA

Understanding & Crafting Development Agreements in Massachusetts, by Edward J Collins, Jr. Center for Public Management, McCormack Graduate School of Policy and Global Studies, UMass Boston, 2013
RENTAL UNIT REGISTRATION

Describe the rental demographics with definitions for:

- Student
- Moderate, Low, and Very-Low Income person

Manage first by identification and then by enforcement

FINAL RECOMMENDATIONS

INNOVATION ECONOMY
INNOVATION ECONOMY
RECOMMENDATIONS

• Need for affordable commercial space for small businesses and entrepreneurs within walking distance of university and downtown

• Support infrastructure for entrepreneurs, inventors, start ups and innovators through cowork, maker, accelerator, incubator spaces

• Formalize the organizational structure in the Town and at the University to promote greater collaboration around local entrepreneurship and translation of research to market

Innovation Districts Assets

| Economic: | Firms, institutions, and organizations that support and nurture innovation |
| Physical: | Buildings, open spaces, streets, and physical infrastructure designed to support interaction and creativity |
| Networking: | Relationships between individuals, firms, & institutions that advances new ideas (social and collaboration network) |

Bruce Katz, Brookings Institute

HYBRID SPACE

Collaborative Learning

University of Wisconsin Institute for Discovery, Madison, WI
Stanford University Design School, Stanford, CA
HYBRID SPACE
Informal Collaboration

Artisan’s Asylum, Somerville, MA
Makerhaus, Seattle, WA

HYBRID SPACE
Maker Spaces

Artisan’s Asylum, Somerville, MA
Makerhaus, Seattle, WA
HYBRID SPACE
Coworking Space

Parliament Co-working, Hobart, AU  Raum Betahaus, Berlin  We Work, Boston, MA

HYBRID SPACE
Accelerators & Start Up Halls

MassChallenge, Boston, MA  Y-Combinator, Silicon Valley, CA  Cambridge Innovation Center, Cambridge, MA
INNOVATION ECONOMY
TOWN-GOWN MAKERSPACE

- Makerspace targeting students of all levels to promote independent learning and experimentation in technology and entrepreneurship
- Partnership between UMass, Town of Amherst, Amherst Media
- Targeting 2,000 square feet in the Amherst Media Building
FINAL RECOMMENDATIONS

ORGANIZATION

CONTEXT

- The Town Gown Steering Committee has created a forum to understand, debate, and collaborate on points of intersection between campus and community
- However, the future of TGSC has not been determined beyond the conclusion of the Housing and Economic Development Plan
- “Institutionalizing” organizations that focus on town/gown issues and opportunities for collaboration have been fruitful in many other college towns
ORGANIZATION
COLLEGE PARK
CITY UNIVERSITY
PARTNERSHIP

CPCUP ability to influence

Degree of importance for CPCUP goals

LOW          HIGH

Create marketing & branding strategy
Support Sustainable MD Certified
Improve & maintain public space and streetscapes
Provide façade improvement grants
Create retail/local business recruitment strategy
Provide “green” standards & incentives
Target local institutional purchasing
Improve MARC/bus usage
Implement school strategies (pre-K to 12)
Develop housing incentive programs
Enhance safety initiatives
Implement Route 1 improvements
Create diversified housing supply strategy
Develop high-tech business attraction strategy
Create bike/pedestrian infrastructure
Develop childcare/early education options
Manage land control & assemblage
Advocate for Purple Line light rail

ORGANIZATION
HOUSING AND DEVELOPMENT
EDUCATION
TRANSPORTATION
SUSTAINABILITY
ORGANIZATION
UNIVERSITY / TOWN OF AMHERST COLLABORATIVE

- Launch University Town of Amherst Collaborative (UTAC)
  - Next iteration of Town Gown Steering Committee
- Recommended Board Membership
  - 3 UMass administrators or faculty, appointed by the chancellor
  - 3 Town administrators appointed by the Town Manager
  - 4 student representatives
  - 2 business leaders
  - 2 resident / Town Meeting representatives
- Board Chairperson is either a University or Town administration affiliate
  - Board Chair rotates between University and town every two years

ORGANIZATION
SUB-COMMITTEES

Launch sub-committees, with co-chairs consisting of one town and one university representative, to identify key goals, initiatives, and interventions within the defined areas.

Three suggested sub-committees are:

- Housing
  - Student housing
  - Housing for faculty and staff
  - Affordable housing
- Economic Development
  - University partnerships
  - Entrepreneurship and start-ups
  - Food, retail, and amenities
- Quality of Life
  - Public Safety
  - Student behavior
ORGANIZATION
KEY COMPONENTS TO UTAC

- Structure - “virtual” or independent non-profit
- Mission and by-laws
- Dedicated funding sources
- Staff support / executive director
- Strategic plan

ORGANIZATION
OTHER RECOMMENDATIONS

Town of Amherst: Recommend hiring a Director for Economic Development
- Can play a key role in UTAC
- Requires an economic skill-set particular to Amherst: understanding of University research and commercialization, focus on arts and culture, tourism

University of Massachusetts: Role out an “anchor strategy” that embraces Amherst
- Work with dining services to create more opportunity for Amherst restaurants and food services
- Encourage student, faculty, researcher ventures to find a place within Amherst
- Provide Incentives for faculty and staff housing in Amherst
IMPLEMENTATION STEPS

ORGANIZATION AND ECONOMIC DEVELOPMENT

- Create a “strategic plan” for UTAC describing its core focus
- Identify founding board members and sub-committee co-chairs carry effort forward
- Translate strategic plan into mission, by-laws, and budget with sources and uses for approval
- Seek out “quick wins” to demonstrate successful town-gown efforts
  - Makerspace
  - Joint event planning in the downtown
  - Adoption of select recommendations from Commissioner Davis
IMPLEMENTATION STEPS
STUDENT HOUSING

• Refine design for optimal site, including housing unit mix, ground floor program, key design features
• Build a project-specific financial model to identify optimal economic structure, including verification of tax implications
• Work with UMass P3 committee to further understand legal and political implications
• Seek approvals and support from Trustees, Town, other leadership
• Solicit feedback from private sector via Request for Expressions of Interest or similar document